

**CLAIMS**

1. A method for developing a multi-channel marketing database which provides a  
5 service offering that enables multi-channel marketers to analyze, create, track,  
control, coordinate, and execute marketing strategies across multiple customer  
touchpoints using various communications media and methods, said method  
comprising the steps of:

- 10 providing a first phase for planning;
- providing second phase for discovery;
- providing a third phase for design;
- providing a fourth phase for development; and
- providing a fifth phase for deployment.

2. The method of Claim 1, wherein once said five phases are complete, an on-going support and maintenance mode is provided.

3. The method of Claim 1, wherein said method is again followed if enhancement projects are required once said five phases are complete.

20 4. The method of Claim 1, wherein said planning step further comprises the step of:  
project formation.

25 5. The method of Claim 4, wherein said project formation step further comprises the step of:

- reviewing client expectations.

6. The method of Claim 4, wherein said project formation step further comprises the step of:

defining project participants and roles.

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7. The method of Claim 4, wherein said project formation step further comprises the step of:

creating a project plan.

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8. The method of Claim 1, wherein said planning step further comprises the step of: project initiation.

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9. The method of Claim 8, wherein said project initiation step further comprises the step of:

planning a client kick-off meeting.

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10. The method of Claim 8, wherein said project initiation step further comprises the step of:

reviewing client executive sponsor responsibilities.

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11. The method of Claim 8, wherein said project initiation step further comprises the step of:

establishing project communication standards.

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12. The method of Claim 8, wherein said project initiation step further comprises the step of:

preparing company team members for discovery.

13. The method of Claim 1, wherein said discovery step further comprises the step of:

5                   conducting a client kick-off meeting.

14. The method of Claim 1, wherein said discovery step further comprises the step of:

business requirements gathering.

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15. The method of Claim 14, wherein said business requirements gathering step further comprises the step of:

reviewing a client's mission statement and business objectives.

16. The method of Claim 14, wherein said business requirements gathering step further comprises the step of:

reviewing a client's organizational structure.

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17. The method of Claim 14, wherein said business requirements gathering step further comprises the step of:

reviewing a client's product and/or service offerings.

18. The method of Claim 14, wherein said business requirements gathering step further comprises the step of:

25                   reviewing a client's target market and competition.

19. The method of Claim 14, wherein said business requirements gathering step further comprises the step of:

reviewing a client's campaign management strategies.

5        20. The method of Claim 14, wherein said business requirements gathering step further comprises the step of:

reviewing a client's critical success factors.

10      21. The method of Claim 1, wherein said discovery step further comprises the step of: multi-channel marketing database requirements gathering.

15      22. The method of Claim 21, wherein said multi-channel marketing database requirements gathering step further comprises the step of:

reviewing multi-channel marketing database reports and templates.

20      23. The method of Claim 21, wherein said multi-channel marketing database requirements gathering step further comprises the step of:

reviewing a client's additional requirements.

25      24. The method of Claim 21, wherein said multi-channel marketing database requirements gathering step further comprises the step of:

reviewing multi-channel marketing database data feeds.

25      25. The method of Claim 21, wherein said multi-channel marketing database requirements gathering step further comprises the step of:

reviewing multi-channel marketing database calculations.

26. The method of Claim 21, wherein said multi-channel marketing database requirements gathering step further comprises the step of:

reviewing multi-channel marketing database update requirements.

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27. The method of Claim 21, wherein said multi-channel marketing database requirements gathering step further comprises the step of:

reviewing multi-channel marketing database access requirements.

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28. The method of Claim 1, wherein said discovery step further comprises the step of:

technical requirements gathering.

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29. The method of Claim 28, wherein said technical requirements gathering step further comprises the step of:

reviewing connectivity, user access, and support requirements.

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30. The method of Claim 28, wherein said technical requirements gathering step further comprises the step of:

reviewing retention, backup, and security requirements.

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31. The method of Claim 28, wherein said technical requirements gathering step further comprises the step of:

reviewing future migration requirements.

32. The method of Claim 1, wherein said discovery step further comprises the step

of:

discovery document compilation.

33. The method of Claim 1, wherein said discovery step further comprises the step

5 of:

discovery document delivery.

34. The method of Claim 1, wherein said design step further comprises the step of:

preparing company team members for design.

10 35. The method of Claim 1, wherein said design step further comprises the step of:

ordering multi-channel marketing database software.

36. The method of Claim 1, wherein said design step further comprises the step of:

planning a design meeting.

15 37. The method of Claim 1, wherein said design step further comprises the step of:

conducting a design meeting.

20 38. The method of Claim 37, wherein said conducting a design meeting step further comprises the step of:

data mapping.

25 39. The method of Claim 37, wherein said conducting a design meeting step further comprises the step of:

data analysis review.

40. The method of Claim 37, wherein said conducting a design meeting step further comprises the step of:

updating database specifications.

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41. The method of Claim 37, wherein said conducting a design meeting step further comprises the step of:

determining calculation specifications.

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42. The method of Claim 37, wherein said conducting a design meeting step further comprises the step of:

determining mapping, report, and query template specifications.

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43. The method of Claim 37, wherein said conducting a design meeting step further comprises the step of:

determining campaign management specifications and schedules.

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44. The method of Claim 1, wherein said design step further comprises the step of:  
design document compilation.

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45. The method of Claim 1, wherein said design step further comprises the step of:  
design document delivery.

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46. The method of Claim 1, wherein said development step further comprises the step of:

planning a development meeting.

47. The method of Claim 1, wherein said development step further comprises the step of:

conducting a development meeting.

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48. The method of Claim 1, wherein said development step further comprises the step of:

analyzing test load and update files.

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49. The method of Claim 1, wherein said development step further comprises the step of:

creating a physical data model.

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50. The method of Claim 1, wherein said development step further comprises the step of:

creating/ modifying specifications.

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51. The method of Claim 50, wherein said creating/ modifying specifications step further comprises the step of:

performing data preparation and determining integration specifications for initial load and on-going updates.

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52. The method of Claim 50, wherein said creating/ modifying specifications step further comprises the step of:

developing database management specifications for Initial Load and On-Going Updates

53. The method of Claim 50, wherein said creating/ modifying specifications step further comprises the step of:

developing report specifications.

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54. The method of Claim 50, wherein said creating/ modifying specifications step further comprises the step of:

developing query template specifications.

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55. The method of Claim 50, wherein said creating/ modifying specifications step further comprises the step of:

creating a test database.

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56. The method of Claim 1, wherein said development step further comprises the step of:

creating one or more unit and system test plans.

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57. The method of Claim 56, wherein said creating one or more unit and system test plans step further comprises the step of:

data preparation and developing integration test plans for initial load and on-going updates.

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58. The method of Claim 56, wherein said creating one or more unit and system test plans step further comprises the step of:

developing database management test plans for initial load and on-going updates.

59. The method of Claim 56, wherein said creating one or more unit and system test plans step further comprises the step of:

developing report test plans.

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60. The method of Claim 56, wherein said creating one or more unit and system test plans step further comprises the step of:

developing query template test plans.

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61. The method of Claim 1, wherein said development step further comprises the step of:

creating/ modifying programs and routines.

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62. The method of Claim 61, wherein said creating/ modifying programs and routines step further comprises the step of:

data preparation and developing integration programs for initial load and on-going updates.

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63. The method of Claim 61, wherein said creating/ modifying programs and routines step further comprises the step of:

developing database management programs for initial load and on-going updates.

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64. The method of Claim 61, wherein said creating/ modifying programs and routines step further comprises the step of:

developing report programs.

65. The method of Claim 61, wherein said creating/ modifying programs and routines step further comprises the step of:

developing query templates.

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66. The method of Claim 1, wherein said development step further comprises the step of:

performing unit / system tests.

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67. The method of Claim 66, wherein said performing unit / system tests step further comprises the step of:

data preparation and developing integration tests for initial load and on-going updates.

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68. The method of Claim 66, wherein said performing unit / system tests step further comprises the step of:

developing database management tests for initial load and on-going updates.

69. The method of Claim 66, wherein said performing unit / system tests step further  
20 comprises the step of:

developing reports.

70. The method of Claim 66, wherein said performing unit / system tests step further  
comprises the step of:

25 developing query templates.

71. The method of Claim 1, wherein said development step further comprises the step of:

processing test data and populating a test database.

5       72. The method of Claim 1, wherein said development step further comprises the step of:

establishing retention, backup, and security procedures.

73. The method of Claim 1, wherein said development step further comprises the step of:

configuring internal end-user tools.

10     74. The method of Claim 1, wherein said development step further comprises the step of:

performing database tuning.

15     75. The method of Claim 1, wherein said development step further comprises the step of:

preparing for deployment tool training.

20     76. The method of Claim 1, wherein said development step further comprises the step of:

constructing a deployment plan.

25     77. The method of Claim 1, wherein said deployment step further comprises the step of:

planning a deployment meeting.

78. The method of Claim 1, wherein said deployment step further comprises the step of:

5 conducting a deployment meeting.

79. The method of Claim 1, wherein said deployment step further comprises the step of:

analyzing live load files.

80. The method of Claim 1, wherein said deployment step further comprises the step of:

creating a live database.

81. The method of Claim 80, wherein said creating a live database step further comprises the step of:

processing live data and populating a live database.

82. The method of Claim 1, wherein said deployment step further comprises the step of:

carrying out a deployment plan.

83. The method of Claim 1, wherein said deployment step further comprises the step of:

conducting a company post-project review

84. The method of Claim 1, wherein said deployment step further comprises the step

of:

conducting a client post-project review.

5        85. A method for developing a multi-channel marketing database which provides a service offering that enables multi-channel marketers to analyze, create, track, control, coordinate, and execute marketing strategies across multiple customer touchpoints using various communications media and methods, said method comprising the steps of:

10            providing a first phase for planning in which a team is identified from both a Company and a client side; and a kick-off meeting is planned that will be held between said client and said Company;

15            providing a second phase for discovery in which said kick-off meeting is held, as well as a requirements gathering meeting where both business and technical requirements are identified and documented in a discovery document which is given to said client for approval;

20            providing a third phase for design in which said Company conducts more than one design meeting with said client to review data analysis from initial test files and determine specifications for data mapping, update rules, calculations, reports, and campaign management, wherein developed information is documented in a design document which is also given to said client for approval;

25            providing a fourth phase for development in which said Company creates unit and system test plans, creates and modifies actual programs and routines, and performs unit and system tests based upon specifications outlined in said design document; wherein said Company also establishes retention, back-up, and security

procedures and configures end-user tools; and wherein output from this phase is a deployment plan which is shared with said client; and

5 providing a fifth phase for deployment in which said Company conducts a deployment meeting with said client, walking through said deployment plan; wherein said Company also analyses final load files from said client and loads a database with live data; wherein said Company provides end-user tool training and access to data as outlined in said deployment plan; and wherein, after a one to two month period, a post-project review is held with said client to ensure that said multi-channel marketing database is meeting said client's expectations.